



Proposal Submission Instructions

Boone County

- ❖ Children's Services Funding
- ❖ Community Health and Medical Funding

City of Columbia

- ❖ Social Services Funding

Heart of Missouri United Way

- ❖ Community Impact Funding

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Contact Information

For questions or to report technical difficulties, please contact:

Boone County	Boone County Community Services 573.886.4298 communityservices@boonecountymo.org www.showmeboone.com/communityservices
City of Columbia	Division of Human Services 573.874.7488 humanservices@como.gov www.como.gov (search: social services funding)
Heart of Missouri United Way	573.443.4523 www.uwheartmo.org

Introduction

These instructions are intended to assist organizations in submitting proposals in response to City of Columbia requests for proposals (RFPs) for social services utilizing the joint City of Columbia, Boone County, and Heart of Missouri United Way web-based funding management system.

Section 1: Accessing the System

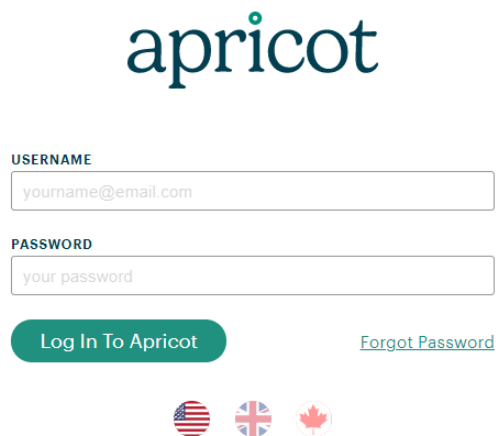
To access the system:

1. Copy and paste the following link to their internet web browser (preferably Google Chrome):
<https://ctk.apricot.info/auth>

PLEASE NOTE

Users **MUST** access the system using either Google Chrome (recommended) or Mozilla Firefox as the internet browser.

2. Enter Username and Password.

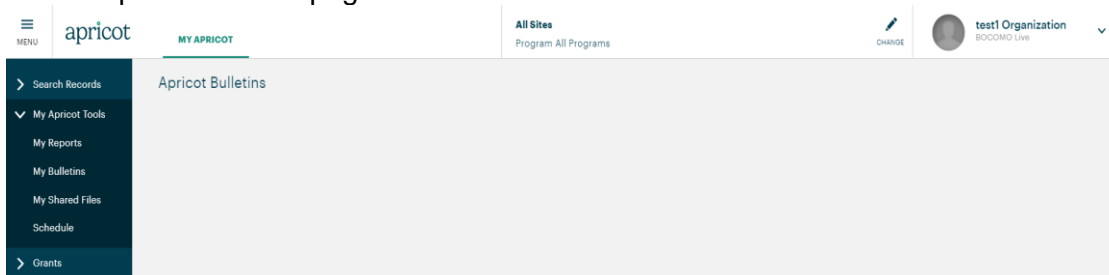


The login interface for the Apricot system. It features the 'apricot' logo at the top. Below the logo are two input fields: 'USERNAME' with a placeholder 'yourname@email.com' and 'PASSWORD' with a placeholder 'your password'. A green 'Log In To Apricot' button is positioned below the password field. To the right of the button is a blue link for 'Forgot Password'. At the bottom, there are three circular icons representing the United States, the United Kingdom, and Canada.

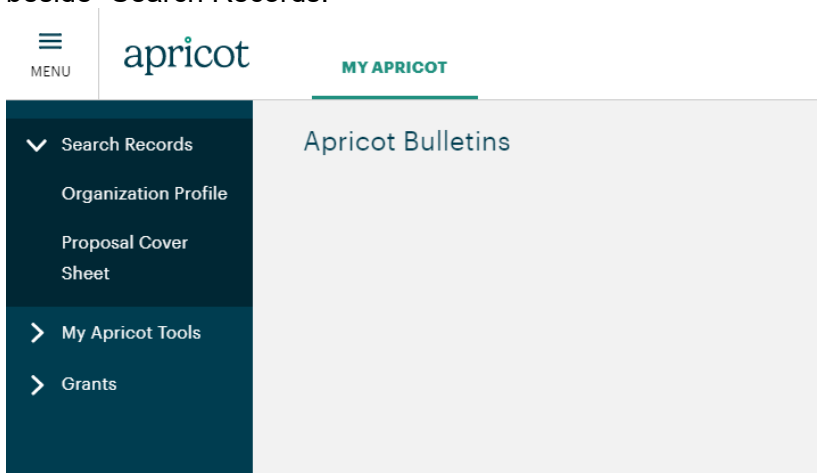
PLEASE NOTE

If your organization does not currently have an Apricot account, please contact the administrator of the RFP to which you are responding. Only one login is granted per organization and logins are valid for all sources of funding. (Boone County, City of Columbia, and the Heart of Missouri United Way.)

- Once you are logged in, you will be navigated to your **MY APRICOT** page. This is one of the main pages users will utilize in navigating the system. Bulletins containing important information are also posted on this page.



- You can navigate to your Organization Profile and Proposal Cover Sheet by selecting the arrow beside "Search Records."



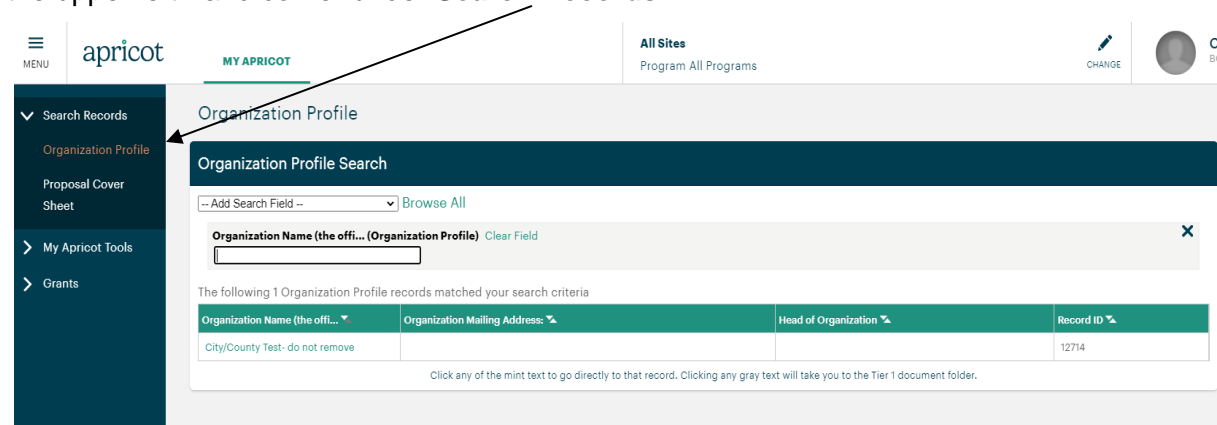
Section 2: Developing and Submitting Proposals

This section provides step-by-step instructions to develop and submit proposals.

Step 1: Update Organization Profile

You will first need to update your **Organization Profile**.

- To access the **Organization Profile**, click on **Organization Profile** in the navigation menu in the upper left-hand corner under **Search Records**.



- This will navigate you to the **Organization Profile Search** page in which your organization name is listed. Click on your organization's name.

Organization Profile

Organization Profile Search

-- Add Search Field -- [Browse All](#)

Organization Name (the offi... (Organization Profile) [Clear Field](#)

The following 1 Organization Profile records matched your search criteria

Organization Name (the offi... ▼	Organization Mailing Address: ▼	Head of Organization ▼	Record ID ▼
City/County Test- do not remove			12714

Click any of the mint text to go directly to that record. Clicking any gray text will take you to the Tier 1 document folder.

- This will navigate you to your **Organization Profile**.

Organization Profile

Organization Profile Instructions ▼

New Users:

In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

Returning Users:

You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

Organization User Information ▼

Primary Information ▼

*Organization Name (the official name of the organization that would enter into a contract):

City/County Test- do not remove

DBA:

Federal EIN Number:

*Organization Type:

Governmental ▼

- Update all applicable information in the **Organization Profile**, including uploaded documents.

Organization Profile

Organization Profile Instructions ▼

New Users:

In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

Returning Users:

You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

COLLAPSE ALL

Record Options ▼

Save Record

Print Mode

View History

View Folder

Assigned Programs ▼

City/County Social Service... Organizations

Program Access

The **Governing Board**, **Advisory Board**, and **Employee Compensation** sections require records for each board or employee position. Click on the **New** tab when adding a board or employee record.

Governing Board ▾

Length of Board Term (e.g. "2 years"):

Organization Governing Board:
Include information for all board members. Click +New to add board member information.

Governing Board Member

☒ Hide Deactivated Links **+ New**

This will open an individual record for each board member or employee.

Governing Board Member

Main ▾

*Name
First Middle Last

Board Position:

Current Board Term Begin Date:
MM/DD/YYYY

Current Board Term End Date:
MM/DD/YYYY

Total Years Served on Board:
00

To edit existing board member or employee records, click any of the fields in the record quick view information. This will open the record for editing.

Governing Board Member

☒ Hide Deactivated Links **+ New**

Governing Board Member					Link Info	
Name	Board Position	Current Board Term Begin Date	Current Board Term End Date	Address	Active	Date
Jane Doe	Chair	01/01/2015	12/31/2017	555 Orchard Ln. Columbia, Mo 65203	<input checked="" type="checkbox"/>	Added on 06/30/2016

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Once the information is added or updated make sure to click on the **Save Linked Record** tab in the **Record Options** box.

Governing Board Member

Main ▾

*Name
Jane Middle Doe

Record Options ▾

Save Linked Record

View Full Record

Cancel

As board members and employees leave and are replaced, rather than adding new records, it is easiest to simply edit an existing record.

If a board member or employee leaves and that position will not be filled, unclick the **Active** check mark. There is no delete button.

Governing Board Member

☒ Hide Deactivated Links New

Governing Board Member					Link Info	
Name	Board Position	Current Board Term Begin Date	Current Board Term End Date	Address	Active	Date
Jane Doe	Chair	01/01/2015	12/31/2017	555 Orchard Ln. Columbia, Mo 65203	<input checked="" type="checkbox"/>	Added on 06/30/2016

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

- To save the information you have entered in your **Organization Profile**, click **Save Record** under **Record Options** as you work on completing these fields and when it is complete.

Organization Profile

Organization Profile Instructions ▼

New Users:

In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

Returning Users:

You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

COLLAPSE ALL

Record Options ▼

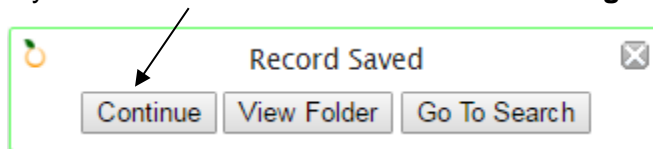
- Save Record
- Print Mode
- View History
- View Folder

Assigned Programs ▼

- City/County Social Service... Organizations
- Program Access

After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

- ❖ If you would like to continue to work on the **Organization Profile**, click on **Continue**.



The **Organization Profile** will remain open.

Organization Profile

Organization Profile Instructions ▼

New Users:

In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

Returning Users:

You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

COLLAPSE ALL

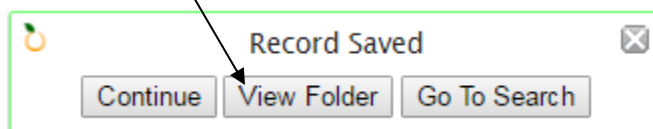
Record Options ▼

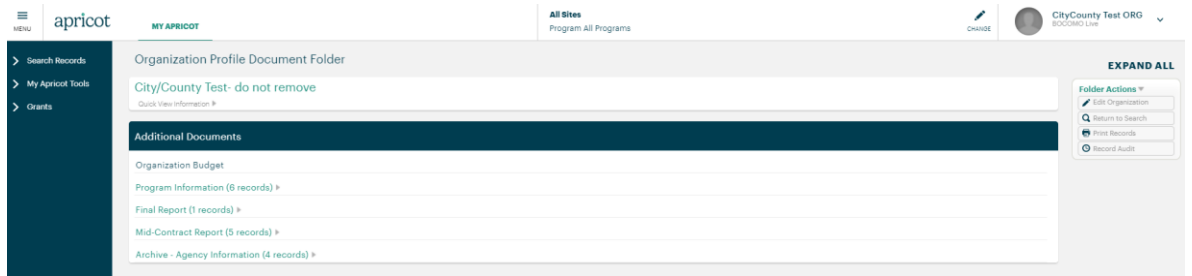
- Save Record
- Print Mode
- View History
- View Folder

Assigned Programs ▼

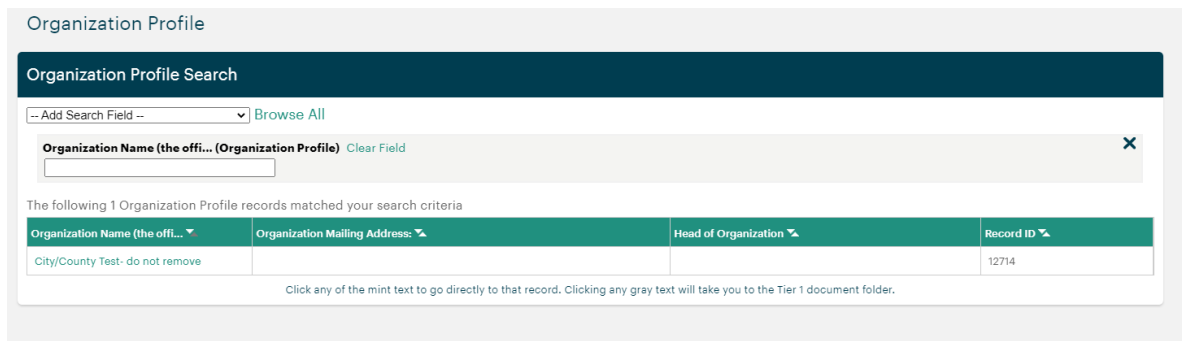
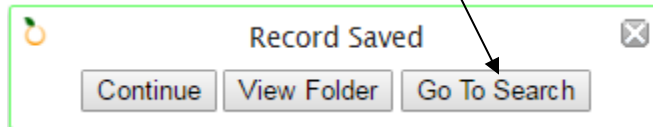
- City/County Social Service... Organizations
- Program Access

- ❖ If **View Folder** is clicked, you will be navigated to the **Organization Profile Document Folder**.





- ❖ If you click **Go To Search**, you will be navigated back to the **Organization Profile Search** that where a link to your **Organization Profile** will be listed.



PLEASE NOTE

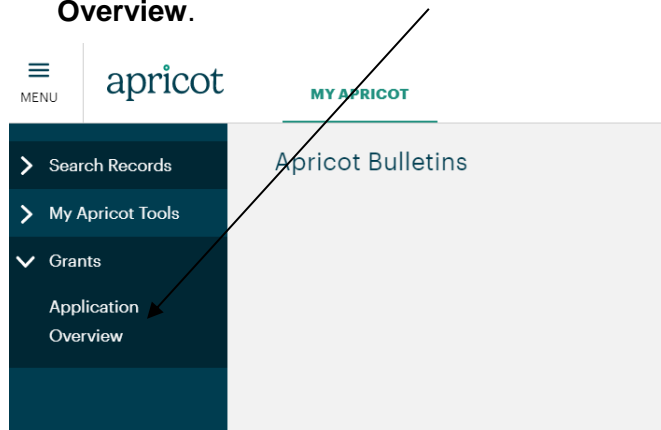
The **Organization Profile** must be complete and up to date when submitting a proposal. Proposals will be considered unresponsive if any applicable fields are incomplete.

There are some fields that are not required form fields but must be completed. Please do not utilize the green check marks, in the **Record Save Checklist** as a guide for completeness.

Step 2: Create Proposal Cover Sheet

The next step is to create a **Proposal Cover Sheet**.

1. In the blue navigation menu on the left side of the screen, click **Grants** and then **Application Overview**.



- This will navigate you to the **Application Overview** page, which will list any **Available** (open) RFPs and RFPs for which you have submitted proposals.

- Click **Open – Click Here to Apply** for the applicable RFP to open a new **Proposal Cover Sheet**.

- Under the **Proposal Request Information** section complete the **Fund Source** (make sure that this matches the RFP for which you are applying, as selected on the **Application Overview** page), **Name of Program or Program**, and the **Amount of the Request**. The **Organization Name**, **Funder**, and **Funding Cycle** will all auto-populate.

PLEASE NOTE

Be sure the fund source you select matches the RFP for which you are applying, as selected on the **Application Overview** page.

5. Scroll down and complete all the fields in the **Program Information** section.

The screenshot shows the 'Program Information' section of a web form. It has a dark blue header with a dropdown arrow. Below the header, there are two main columns of fields. The left column is for 'Program Website (will default to Organization website)' with a text input field containing 'http://www.google.com'. Below that is 'Program Address (will default to Organization Physical Address)' with a 'Clear' button. This is followed by 'Address' (Line 1, Line 2), 'City', 'State' (dropdown), 'County', and 'Zip'. The right column is for 'Program Mailing Address (will default to Organization Mailing Address)' with a 'Clear' button. It follows the same structure: 'Address' (Line 1, Line 2), 'City', 'State' (dropdown), 'County', and 'Zip'.

6. Some RFPs require additional **Attachments** or **Addendums** which must be uploaded in the fields provided in the include **Required Attachments** section. As applicable, these fields must be completed before submitting the proposal.

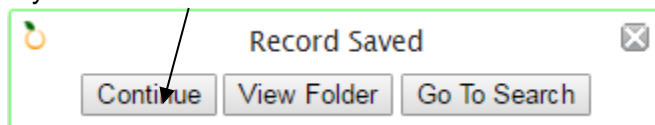
The screenshot shows the 'Required Attachments - Children's Services Fund and Community Health Only' section. It lists four attachment types, each with a 'Choose File' button and 'No file chosen' text, and a file size limit of 'Up to 25 MB':
1. Attachment A 2021 Organization Assurance Sheet
2. Attachment B Certification Regarding Debarment, Suspension, Ineligibility, and Volunteer Exclusion
3. Attachment C Work Authorization Certification
4. Signed Addendums

7. To save the information you have entered in the **Proposal Cover Sheet**, click **Save Record** under **Record Options**.

The screenshot shows the 'Proposal Request Information' section. The main area has a dark blue header with a dropdown arrow. Below it, there's a 'Grant' section with the text 'Children's Services Fund - Identified Youth Needs (Application in Process)'. Below that is a field for '*Organization Name (will auto-populate)' with a lock icon and a text input field containing 'City/County Test- do not remove'. To the right is a sidebar with a 'COLLAPSE ALL' button. Below that are two sections: 'Record Options' with a 'Save Record' button, and 'Assigned Programs' with a '(New) Organizations' link and a 'Program Access' link.

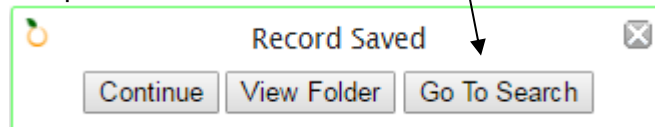
After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

- ❖ If you would like to continue to work on the **Cover Sheet**, click on **Continue**.



The **Proposal Cover Sheet** will remain open.

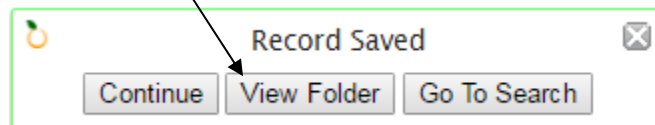
- ❖ If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Search** that lists all the cover sheets for proposals that the organization has started or completed.



For example, the **Proposal Cover Sheet Search** for this organization indicates the organization has three **Cover Sheets**. Any one of these may be clicked to access the cover sheet.

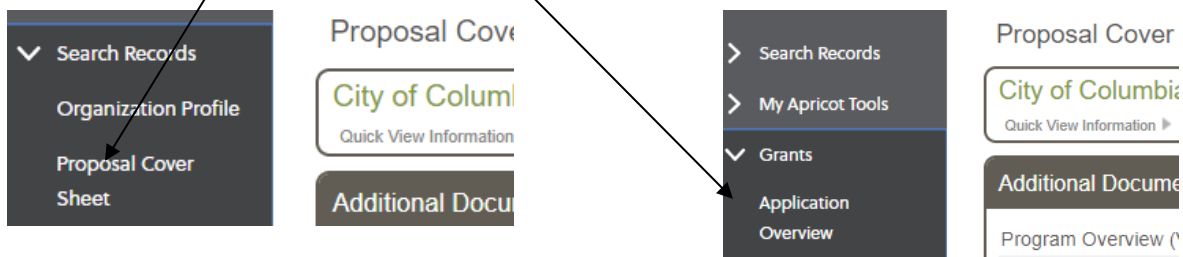
Proposal Cover Sheet Search					
-- Add Search Field -- The following 6 Proposal Cover Sheet records are available					
Grant	Organization Name (will aut...	Fund Source	Funder	Funding Cycle	Name of Program or Project
City of Columbia- RFP FY2018 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT)	City/County Test- do not remove	Social Services FY2018	City of Columbia	FY2018	Test 1
City of Columbia- RFP FY2019 Social Services (Proposal in	City/County Test- do not		City of		

- ❖ If **View Folder** is clicked, you will be navigated to the **Proposal Cover Sheet Document Folder**.



From the **Proposal Cover Sheet Document Folder**, you can begin completing the proposal forms, per Step 3.

8. You can navigate back to any **Proposal Cover Sheets** you have created by clicking on either the **Proposal Cover Sheet** or **Application Overview** the white navigation menu on the left side of the screen.

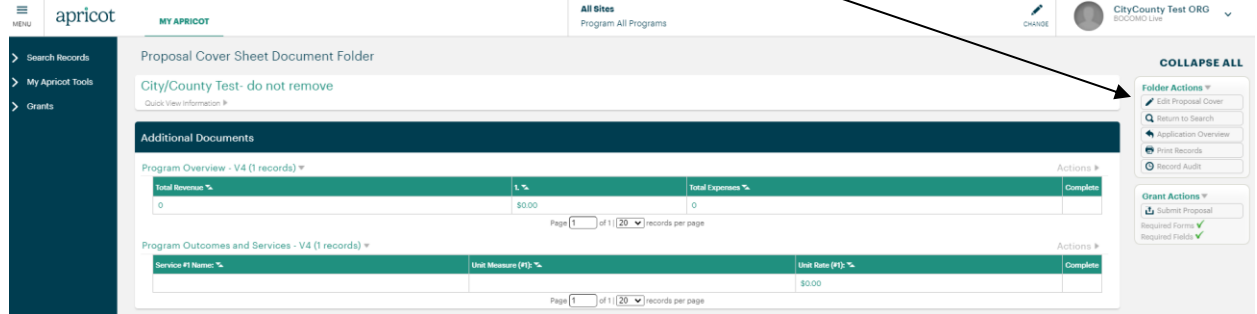


Clicking on these links will respectively direct you to the **Proposal Cover Sheet Search** page or the **Application Overview** page.

- ❖ To open the **Proposal Cover Sheet** from the **Proposal Cover Sheet Search** page, click on any of the form quick fields for the applicable cover sheet.

- ❖ To access the **Proposal Cover Sheet** from the **Application Overview** page, click on any of the form quick fields for the applicable cover sheet.

This will navigate you to the **Proposal Cover Sheet Document Folder**. To open the **Proposal Cover Sheet**, click on **Edit Proposal Cover** in the navigation menu on the right-hand side of the screen under **Folder Actions**.



Step 3: Create Proposal Forms

PLEASE NOTE

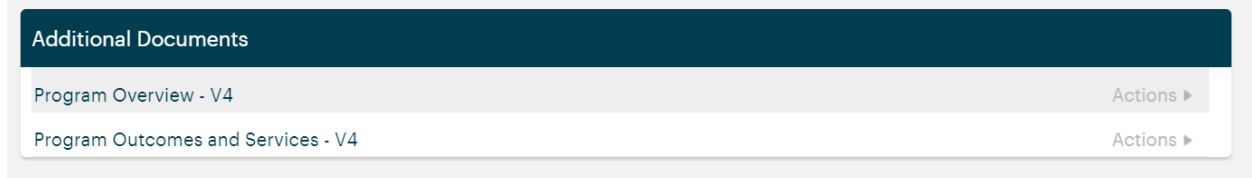
While not a requirement, it is highly recommended that you complete all the fields in the **Organization Profile** and the **Proposal Cover Sheet** before creating proposal forms as information from these forms is auto-populated in the proposal forms. The **Name of the Program or Project** and the **Amount Requested** can be changed or saved at any time in the **Proposal Cover Sheet**.

- Once you have completed the **Proposal Cover Sheet**, you can create the proposal forms.

For each proposal, you will need to create the following forms:

- ❖ One **Program Overview** form
- ❖ One **Program Outcomes and Services** form

- To locate the proposal forms, navigate to the **Proposal Cover Sheet Document Folder**, per Section 2.2.8. The **Proposal Cover Sheet Document Folder** contains all the forms for each proposal, under **Additional Documents**.



- To create a proposal form, click on the **Actions** link arrow on the right-hand side of the box. When you hover over the word **Actions**, **Create New** will appear. Click on **Create New** to create a new proposal form.



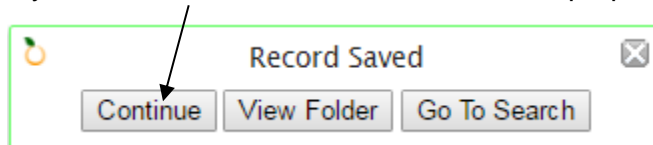
4. To save a proposal form you have created and/or the information you have entered in a proposal form, click on **Save Record**, in the **Record Options** menu.

The screenshot shows the 'Program Overview - V4' form. At the top, there's a header 'City/County Test- do not remove' with a 'Quick View Information' link. Below this is a dark blue bar labeled 'Program Proposal Form Information:'. The main content area contains text about the purpose of the form and guidelines. On the right side, there's a sidebar with a 'COLLAPSE ALL' button and three menu sections: 'Record Options' (containing 'Save Record' and 'View Folder'), 'Assigned Programs' (containing '(New) Organizations' and 'Program Access'), and 'Record Save Checklist'.

After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

- ❖ If **View Folder** is clicked, you will be navigated back to the Proposal Cover Sheet **Document Folder** where the proposal forms are located (under **Additional Documents**).

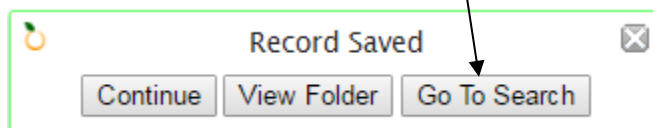
If you would like to continue to work on the proposal form, click on **Continue**.



The proposal form will remain open.

This is an identical screenshot of the 'Program Overview - V4' form as shown in the previous image, displaying the form structure and the sidebar menu.

- ❖ If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Search** that lists all the cover sheets for proposals that the organization has started or completed.



Step 4: Complete Proposal Forms

As you complete the proposal forms, please note the following:

- ❖ Be sure to thoroughly read the instructions for each form and section.
- ❖ The time period of the proposed year is indicated in each RFP.
- ❖ The total amount proposed should be the same in the Program Overview form, Program Outcomes and Services form, and Proposal Cover Sheet.
- ❖ Remember to save frequently so information is not lost.

Program Overview Form

As you complete the Program Overview form, please note the following:

Program Consumers

- ❖ The total number of unduplicated individuals to be served is for the entire proposed program.
- ❖ Program Consumer Demographics
 - The totals in each sub-section should match one another and should match the total number of unduplicated individuals to be served.
 - Consumer Demographics by Residence
 - The number of Boone County residents to be served should include all City of Columbia residents to be served (all City of Columbia residents are also resident of Boone County).
 - The Residence Total is a calculation which totals the county counts.

The screenshot shows a form titled "Residence" with a dropdown arrow. It contains several input fields for counting residents. On the left, there is a list of counties: Boone County (includes City of Columbia residents), Cooper County, Howard County, and Other Counties. Each county name is followed by a text input field containing the number "0". Below these is a "Residence Total" label followed by a text input field also containing "0". On the right side of the form, there is a label "City of Columbia" followed by a text input field containing "0".

Program Budget

- ❖ The Proposed period is indicated in each RFP.
- ❖ Amounts should be for entire program.
- ❖ Be sure to include a narrative for each item.
- ❖ Be sure to include the total proposed amount in the applicable revenue source. This amount should match the total amount proposed as indicated in the Proposal Cover Sheet and Program Outcomes and Services form.

Program Outcomes and Services Form

As you complete the Program Outcomes and Services form, please note the following:

Program Outcomes and Performance Measures

- ❖ Complete the logic model for the entire program.
- ❖ Outcomes must be selected from the Boone Impact Group Common Outcomes included with each RFP.
- ❖ Up to three Indicators can be included for each Outcome.
 - Only one data point should be included in each Indicator %, Indicator, and Method of Measurement field.

- Only list a number in the Indicator % fields. Do NOT include the % symbol in these fields.
- ❖ All program services indicated in the Program Services section should be indicated as contributing to at least one Outcome.
 - Program services should be included regardless of whether or not they are being proposed for funding.
- ❖ All program services which contribute to an Outcome should be listed in the Contributing Services.
 - This may mean services are indicated across multiple outcomes.

Program Services

- ❖ Program services must be selected from the Boone Impact Group Taxonomy of Services included with each RFP.
- ❖ Enter program services for which funding is requested first.
- ❖ You only need to enter detailed information for services for which funding is requested.
- ❖ As applicable by funder, the program services should match the program services approved in the Letter of Intent.

Step 5: Review Proposal

Before submitting a proposal, it is critical that you review the **Organization Profile, Proposal Cover Sheet, and Proposal forms** to ensure all forms were created and all fields are completed.

1. Review the **Organization Profile** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required form fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

The screenshot shows the Apricot system interface. On the right side, the 'Record Save Checklist' is visible, showing 'Required Field Checks' with a red X. A red arrow points from the text above to the 'Required Field Checks' link in the checklist.

If a “✓” is displayed, the minimum required system fields in the form have been completed.

The screenshot shows the Apricot system interface. On the right side, the 'Record Save Checklist' is visible, showing 'Required Field Checks' with a green checkmark. A green arrow points from the text above to the 'Required Field Checks' link in the checklist.

However, most of the fields in the **Organization Profile** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Organization Profile**.

2. Review the **Proposal Cover Sheet** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required from fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

The screenshot shows the 'Proposal Cover Sheet' form in the Apricot system. The form is titled 'Proposal Request Information' and contains several sections: Grant, Fund Source, Funder, Funding Cycle, Name of Program or Project, City Social Services - Issue Area, and City Social Services - Program Service Period. On the right side, there is a 'Record Save Checklist' section. Under this checklist, the 'Required Field Checks' section shows a red 'X' next to 'Required Field Checks' and a green checkmark next to 'Field Validation Checks'. A black arrow points from the text 'If an “X” is displayed, the required form fields are incomplete...' to the red 'X' in the 'Required Field Checks' section of the 'Record Save Checklist'.

If a “✓” is displayed, the minimum required system fields in the form have been completed.

The screenshot shows the 'Proposal Cover Sheet' form in the Apricot system. The form is titled 'Proposal Request Information' and contains several sections: Grant, Fund Source, Funder, Funding Cycle, Name of Program or Project, City Social Services - Issue Area, and City Social Services - Program Service Period. On the right side, there is a 'Record Save Checklist' section. Under this checklist, the 'Required Field Checks' section shows a green checkmark next to 'Required Field Checks' and a green checkmark next to 'Field Validation Checks'. A black arrow points from the text 'If a “✓” is displayed, the minimum required system fields in the form have been completed.' to the green checkmark in the 'Required Field Checks' section of the 'Record Save Checklist'.

However, most of the fields in the **Proposal Cover Sheet** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Cover Sheet**.

3. Review the **Proposal Cover Sheet Document Folder** to be sure all required proposal forms were created.

The presence of the required proposal forms is indicated in the white navigation menu on the right side of the screen under **Grant Actions**.

If an “X” is displayed, one or more of the required proposal forms is missing.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information

Additional Documents

Program Overview - V4 (1 records)

Total Revenue %	L %	Total Expenses %	Complete
0	\$0.00	0	Complete

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4

Record Save Checklist

Required Fields X

Required Fields - V4

If a “✓” is displayed, the required proposal forms are present.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information

Additional Documents

Program Overview - V4 (1 records)

Total Revenue %	L %	Total Expenses %	Complete
0	\$0.00	0	Complete

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records)

Service #1 Name %	Unit Measure (P/D) %	Unit Rate (P/D) %	Complete
		\$0.00	Complete

Page 1 of 1 | 20 records per page

Record Save Checklist

Required Fields ✓

Required Fields - V4

4. Review the **Proposal Forms** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required from fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

Program Overview - V4

City/County Test- do not remove

Quick View Information

Program Proposal Form Information

The purpose of the Program Overview form is to provide detailed information regarding the program and proposed service(s).

Guidelines:

- Information should be based on the proposed contract/agreement period.
- Information provided should be for the entire program, not just the portion proposed to be contracted/funded by the Boone County, City of Columbia, and/or the Heart of Missouri United Way.
- Each narrative response should be clear and succinct.
- Information provided in the Program Overview form must correspond with the information provided in the Program Outcomes and Services form.
- All sources of information should be properly cited using the American Psychological Association (APA) Style of author-date method of in-text citation. All sources that are cited must appear in the reference list at the end of this form.

Resources:

- Boone Indicators Dashboard (<http://booneindicators.org>)
- For detailed information regarding the APA Style, please visit the APA Style web site: <http://www.apastyle.org/>

* Indicates Required Field

Record Lock

Unlocked

Record Save Checklist

Required Field Checks X

Required Field Checks - V4

If a “✓” is displayed, the minimum required system fields in the form have been completed.

However, most of the fields in the **Proposal Forms** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Forms**.

Step 6: Submit Proposal

Once you have reviewed the proposal, you will need to submit it.

1. Return to the **Proposal Cover Sheet Folder** and click on the applicable **Proposal Cover Sheet** for the proposal being submitted.

This will navigate you to the **Proposal Cover Sheet Document Folder**. Click on the **Submit Application** under the **Grant Actions**.

- To submit the proposal, click **Submit Proposal** under the **Grant Actions**.

The screenshot shows the Apricot system interface. On the left is a navigation menu with options like 'Search Records', 'My Apricot Tools', and 'Grants'. The main area displays 'Proposal Cover Sheet Document Folder' for 'City/County Test- do not remove'. It includes sections for 'Additional Documents', 'Program Overview - V4 (1 records)', and 'Program Outcomes and Services - V4 (1 records)'. On the right, a 'Grant Actions' menu is visible, containing 'Submit Proposal', 'Required Forms', and 'Required Fields'. An arrow points from the 'Submit Proposal' button to the text in the first list item.

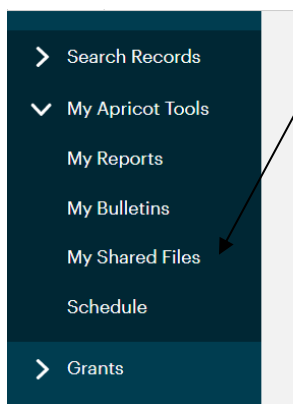
PLEASE NOTE

- ❖ Once submitted, the proposal forms are locked and can no longer be edited. If you inadvertently submit a proposal prior to the submission deadline, contact the applicable funder to re-open the proposal forms.
- ❖ You must submit each proposal individually following the actions outlined in **Step 5**:

Section 3: Helpful Tips

❖ My Shared Files

Supporting RFP documents are located in the My Shared Files page. To access these documents, click **My Shared Files** in the navigation menu on the left-side of the screen.



This will navigate you to the **My Shared Files** page. Click on the triangle next to the funder to access the documents.

The screenshot shows the 'My Shared Files' page in the Apricot system. The left navigation menu is visible, with 'My Shared Files' selected. The main area is titled 'Shared Files' and lists three document folders: 'City of Columbia documents', 'Boone County Documents', and 'Heart of Missouri United Way Documents'. Each folder has a right-pointing triangle next to it. An arrow points from the text 'Click on the triangle next to the funder' to the triangle next to 'City of Columbia documents'.

❖ Symbols

The following are symbols utilized in the *Apricot* funding management system.

*	Required Field
▼	Open or close viewing of forms.
?	Tool Tip: If the cursor hovers over this it will information about that specific request or requirement.
✓	Indicates required system fields have been completed. (Please Note: A green check mark does not necessarily indicate that a form is complete.)
✗	Indicates that the required system fields are incomplete.
⋮	Enables users to see section values in the Additional Documents section.
🔒	Indicates that the field will be auto-populated. The user doesn't have the ability to enter any information.

❖ Printing Records

Forms can be printed using the **Print Mode** feature located in the **Record Options** menu on the right side of the screen.

The screenshot displays the Apricot system interface. On the right side, a sidebar menu is visible under the heading 'COLLAPSE ALL'. This menu includes a 'Record Options' section with the following items: 'Save Record', 'Print Mode' (highlighted by an arrow from the text above), 'View History', and 'View Folder'. Below this, there are sections for 'Assigned Programs' (Organizations, Program Access) and 'Record Save Checklist' (Required Field Checks, Field Validation Checks). The main content area shows a 'Program Overview - V4' form with a 'City/County Test- do not remove' header and a 'Program Proposal Form Information' section.